

Nurseries and Greenhouses

Nurseries and greenhouses represent that largest single cluster in Clackamas County's agriculture sector.

Within Oregon's nursery and greenhouse cluster, Clackamas County is the leading sales producer with over \$199 million in annual gross sales. After the start of the recent U.S. recession – December 2007 – consumer interest in home gardening grew. Increasing consumer demand, combined with global pressure to feed a world population of over seven billion, is creating new opportunities in the nursery and greenhouse cluster. As the national and state leader in the industry, Clackamas County has favorable climate, good soils, long growing season and skilled workforce necessary to expand this well-established "green industry."



Economic Benefits to Clackamas County and the Region

The nursery and greenhouse cluster has been prominent in Clackamas County for many decades, particularly in agricultural and rural locations. There are 145 nursery and greenhouse companies with over 4,200 workers in Clackamas County. While this cluster is dominated by small to medium size companies, nurseries and greenhouses includes two of the county's top 100 employers.

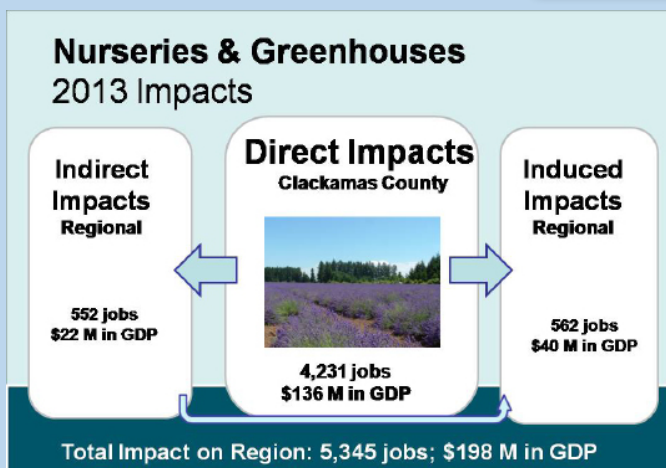
This cluster provides a large mix of entry level and management career opportunities, and is expected to grow faster than average over the coming decade. The direct economic benefit from production costs, employee compensation, and tax payments accounts for \$136 million in value added GDP in Clackamas County, and leverages an additional \$62 million in secondary regional GDP from supply chain purchases and employee spending multipliers.

Nursery and Greenhouse Cluster

Current Stats for Clackamas County

- Gross Domestic Product (GDP): \$136 M
- Cluster Share of County GDP: 0.7%
- Exports/Sales from Outside Region: 94%
- Direct Employment: 2,013
- County Businesses: 145
- Number of Businesses in the Top 100: 2
- 10-year Job Growth Forecast: 23%
- Cluster Location Quotient (LQ): 2.17

Source: compiled by FCS GROUP based on IMPLAN (2013), adjusted to 2015 dollars. 10-year forecast provided by the Oregon Employment Department. GDP = gross domestic product. Location Quotient (LQ) depicts relative share of this industry's contribution in Clackamas County compared to this industry's contribution in the 9-county Metropolitan Statistical Area.



Nursery and Greenhouse Cluster: Annual Economic Benefits

	2006	2010	2013
Industry Location Quotient	2.1	2.56	2.17
Contribution to County GDP	2.0%	0.8%	0.7%
Business Establishments in County	117	146	145
Average Labor Income in County	\$30,426	\$32,008	\$37,786
Total Labor Income in County	\$144,740,000	\$102,170,000	\$76,060,000
Employment			
Direct Jobs in Clackamas County	4,757	3,192	2,013
Secondary Jobs	1,273	883	1,114
Total Direct & Secondary Employment	6,030	4,075	3,127
Direct GDP and Output in Clackamas County			
Direct GDP (Value Added)	\$240,210,000	\$145,520,000	\$136,470,000
% Traded Outside Region	n/a	83%	94%
Output	\$320,530,000	\$235,420,000	\$198,620,000

GDP = Gross Domestic Product.

Source: Analysis by FCS GROUP. All data in this table with the exception of business establishments, are based on 2006, 2010, 2013 IMPLAN estimates. Employment reflects total jobs (full and part time workers as well as the self-employed). Estimated business establishments are derived from the Oregon Employment Department. Location quotients are based on Clackamas County's relative propensity to attract employers within this cluster in comparison to the nine-county Portland-Vancouver Metropolitan Statistical Area (MSA). *Note: Dollar figures are adjusted to 2015 dollars.*

Nursery and Greenhouse Strategic Market Opportunities

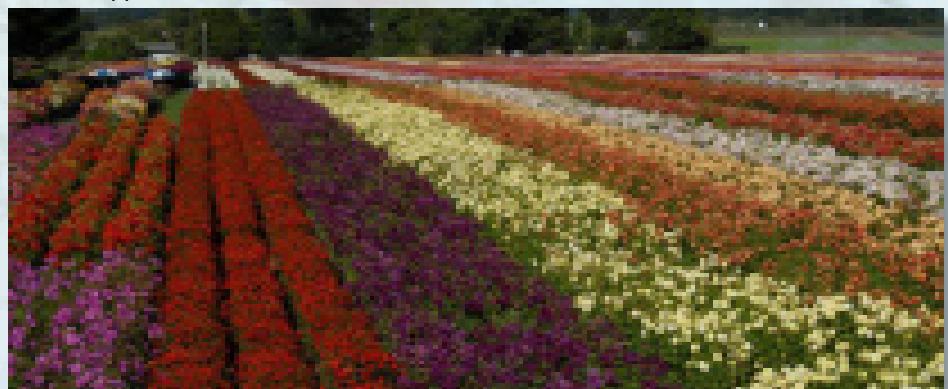
- Carbon and ecosystem services markets will increase demand for nursery products as communities at all scales implement actions to sequester carbon in forest stands and repair degraded environments. Interest in carbon sequestration presents opportunities for the nursery and greenhouse industries to produce plant materials for new markets.
- Providing context-sensitive plant materials for urban and rural landscapes will be an expanding global opportunity for Clackamas County. Urban development in Asia provides major growth opportunities. Specific product opportunities include plant materials for urban stormwater management, urban landscaping, rooftop and eco-wall vegetation, and restoration and protection of areas impacted by climate change such as coastal properties and degraded watersheds.
- Urban and metropolitan food production also appears to be an emerging opportunity for Clackamas County. With climate change, water scarcity, and energy price increases, there appears to be a shift underway emphasizing local and regional agriculture for food production. This shift provides an opportunity for county-based firms to provide nursery plants for food production and intensive greenhouse-based agriculture.

Nursery and Greenhouse Cluster North American Industrial Classification System (NAICS) Categories

111421: Nursery and Tree Production

111422: Floriculture Production

Description: Includes businesses primarily engaged in growing and/or producing: nursery products, nursery stock, shrubbery, bulbs, fruit stock, sod, and floriculture products (e.g., cut flowers and roses, cut cultivated greens, potted flowering and foliage plants, and flower seeds) under cover and in open fields.

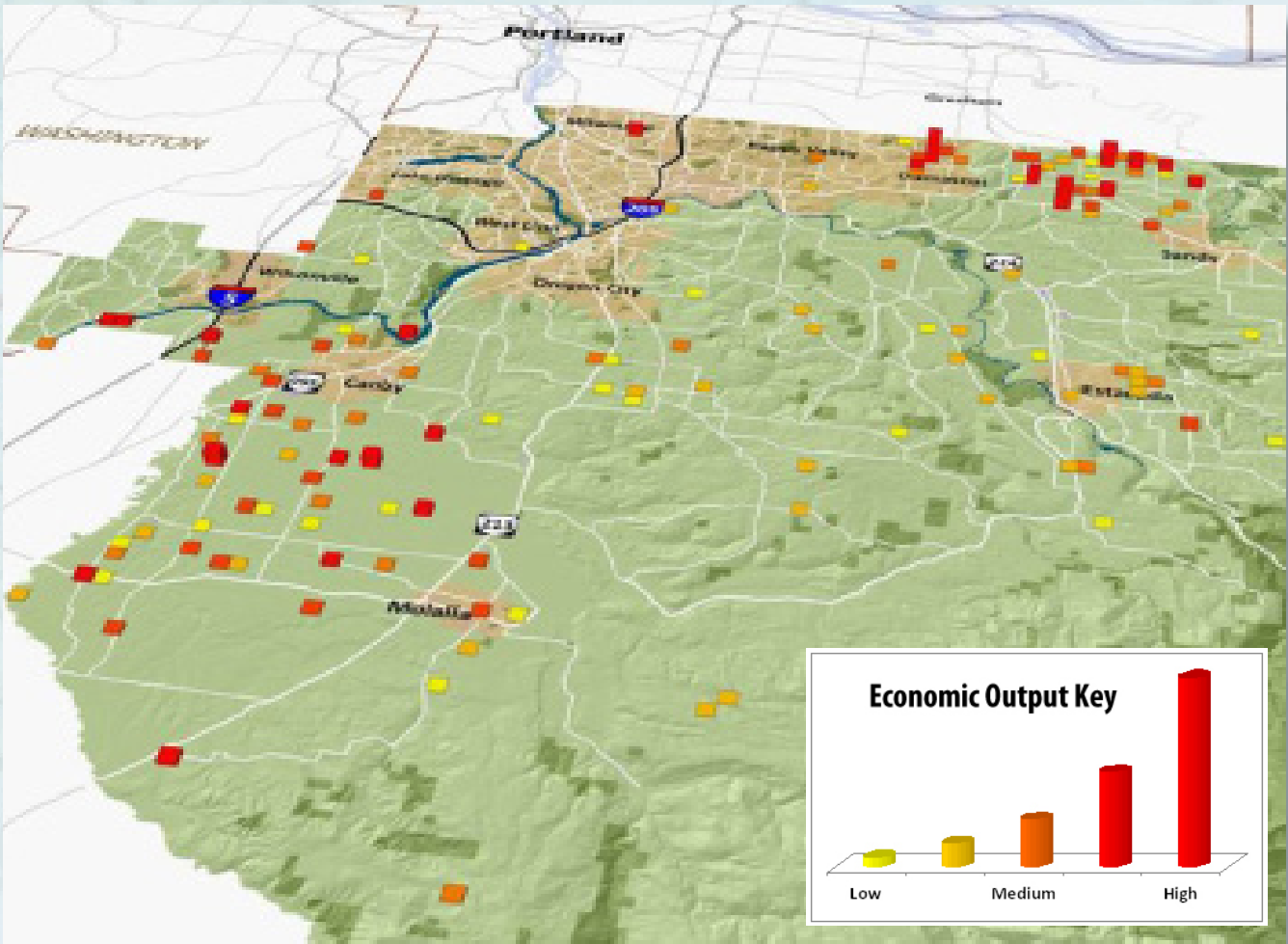


Sample of Representative Nursery and Greenhouse Companies in Clackamas County
Early Morning LLC *
J. Frank Schmidt & Son Company
Joe Koida Florist Inc.
John Holmlund Nursery LLC
Leo Gentry Wholesale Nursery Inc. *
PRT USA Inc.
Terra Nova Nurseries Inc.
Willamette Nurseries Inc.
Yoshitomi Bros Inc.



Source: Oregon Employment Department; FCS GROUP
 * Indicates top 100 County Business Listing

Existing Nursery and Greenhouse Businesses: Annual Economic Output by General Location*



* Reflects total economic output attributed to business activities measured in 2013 using the IMPLAN model for Clackamas County.

CLACKAMAS COUNTY ECONOMIC LANDSCAPE Nurseries and Greenhouses

Career Opportunities

The variety of jobs in the nursery and greenhouse cluster include:

- Nursery grower
- Retailer
- Landscape professional
- Supplier

Job skills involve:

- Plant care
- Plant propagation
- Production and inventory management
- Sales and marketing
- Graphic design
- Information systems
- Accounting
- Landscape design
- Research

Clackamas Community College offers relevant advanced educational certificate and degree programs, including a Horticulture Certificate and Horticulture Associate of Applied Science Degree. Other degrees in arts, sciences and business are directly applicable to this sector, and are offered by surrounding community colleges and universities.



Resources

Clackamas County Business & Economic Development
www.clackamas.us/business

Business Oregon
www.oregon4biz.com

Clackamas Workforce Partnership
www.clackamasworkforce.org
Oregon Association of Nurseries
www.oan.org

Oregon Department of Agriculture
www.oregon.gov/ODA

OSU North Willamette Research and Extension Center
www.oregonstate.edu/dept/NWREC

Clackamas Community College
www.clackamas.edu

OSU Extension Service
www.extension.oregonstate.edu

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